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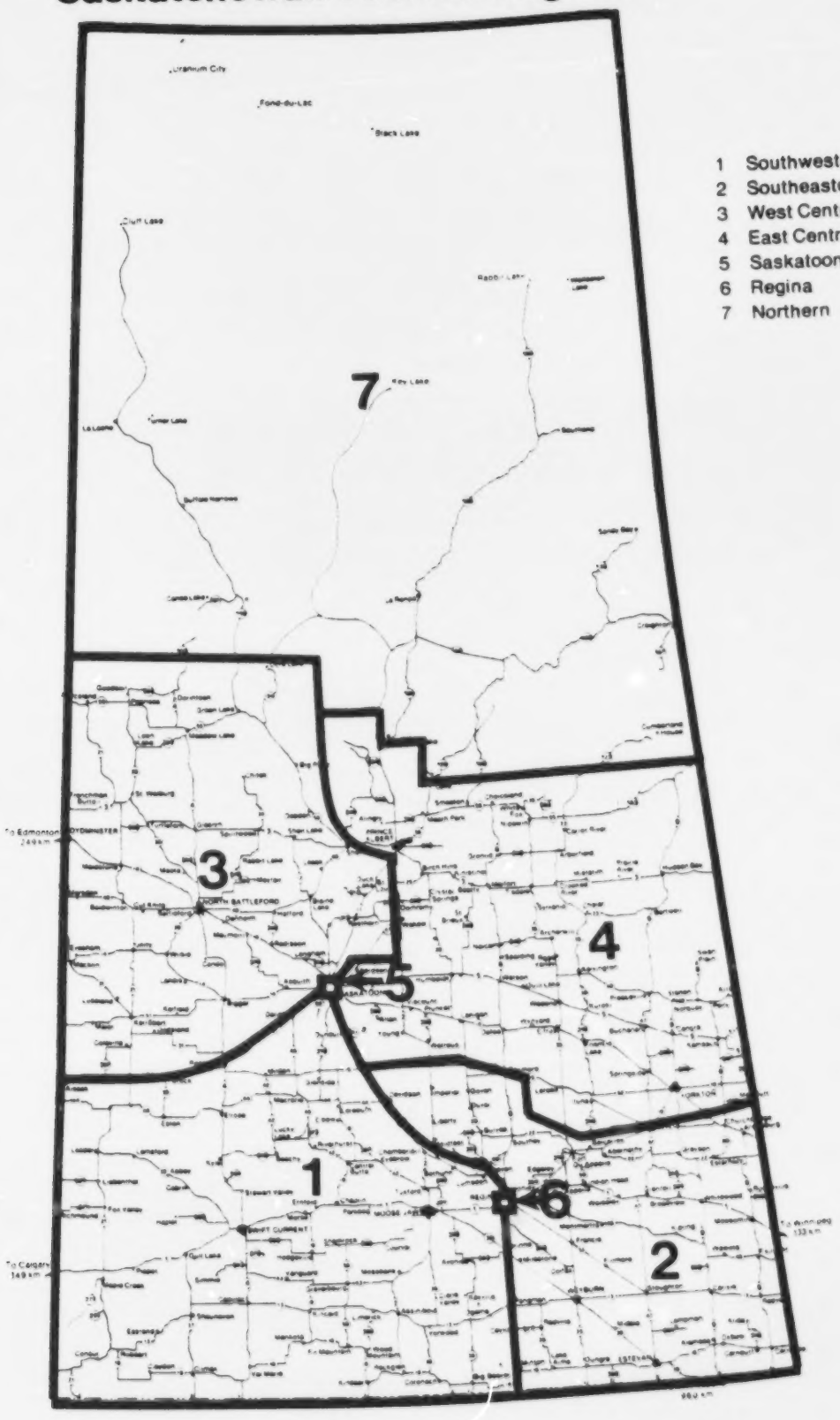
Saskatchewan Tourism Regions



1 Southwestern
2 Southeastern
3 West Central
4 East Central
5 Saskatoon
6 Regina
7 Northern

1. INTRODUCTION

The "Tourism Data Book" is designed to incorporate under one cover a summary of available information on travel, tourism and outdoor recreational activity to and within Saskatchewan.

Facts and figures relating to Saskatchewan's tourism/recreation industry exist in various detailed documents and computer print-outs, and come from a variety of sources.

The presentation of this type of data in one report is intended to meet requirements of both individuals in the public and private sectors who require an overview of the provincial tourism/recreation industry as opposed to intensive information.

Any questions concerning the contents or requests for additional information can be directed to the Business Library (306) 787-9552.

2. TOURISM MARKET PROFILE

2.1. Saskatchewan Residents

The implications of population redistribution, growth or decline have a direct impact on demand for travel activity. The volume of travel is also a function of age composition.

Saskatchewan's population has grown by 81,000 people between 1961 and 1984, a 8.7 per cent increase. This recent growth has significant implications for the demand for tourism facilities by Saskatchewan residents.

Saskatchewan Population, 1961, 1966, 1971-1984

Year	Population
1961	925,200
1966	955,400
1971	926,200
1972	914,000
1973	904,500
1974	899,700
1975	907,400
1976	921,300
1977	934,900
1978	943,500
1979	951,300
1980	959,400
1981	968,300
1982	979,400
1983	992,100
1984	1,006,200

Source: Statistics Canada, Catalogue 91-201, Estimates of Population for Canada and the Provinces, June 1, 1984 (Table 8).

The population of Saskatchewan is projected to exceed 1.1 million by the year 2000, resulting in a further increased demand for provincial tourism/recreation facilities.

Saskatchewan Population Projections,
1985 - 2000

Year	Projected Population
1985	1,027,300
1986	1,041,000
1987	1,054,000
1988	1,065,700
1989	1,075,500
1990	1,082,800
1991	1,088,700
1992	1,093,100
1993	1,096,000
1994	1,097,400
1995	1,097,700
1996	1,097,100
1997	1,097,100
1998	1,097,900
1999	1,099,800
2000	1,103,100

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, Population Projections - January, 1985, TAB: POPULATION.

Changes in age composition affect the demand for travel. People in the 20-30 age category are more mobile and spend more on travel while the 65-and-over category will require more services and facilities tailored to this age group. This latter age group also exerts the greatest demand for packaged vacations.

Saskatchewan Population,
Distribution by Age Group,
1971, 1976, 1981

Age Group	1971	%	1976	%	1981	%
0 - 9	178,200	19.2	152,700	16.6	158,800	16.4
10-19	198,100	21.4	192,200	20.9	174,700	18.0
20-29	121,900	13.2	146,500	15.9	170,200	17.6
30-39	95,600	10.3	96,100	10.4	118,700	12.3
40-49	102,800	11.1	93,400	10.1	90,700	9.4
50-59	96,400	10.4	95,400	10.4	94,500	9.8
60-69	69,600	7.5	77,600	8.4	83,800	8.7
70-79	41,300	4.5	44,300	4.8	51,900	5.4
80+	22,400	2.4	23,100	2.5	24,600	2.5
Total	926,200	100.0	921,300	100.0	968,300	100.0

Source: Statistics Canada, Catalogue 91-518, Population 1971-1976 and Population 1976-1981.

In 1951, 69.6% of Saskatchewan population was rural. By 1981, the figure was 41.8%. The urbanization of the Saskatchewan population brings with it a variety of needs which have a direct bearing on the travel industry, from a need for more jobs to a need for more leisure activity.

Saskatchewan Population,
Urban and Rural Distribution,
1951-1981

Year	Total	Urban	Rural		
			Total	Farm	Non-Farm
1951*	831,728	252,470	579,258	399,473	179,785
1956	880,665	322,003	558,662	360,651	198,011
1961	925,181	398,091	527,090	304,672	222,418
1966	955,344	468,327	487,017	279,642	207,375
1971	926,245	490,635	435,610	233,335	202,275
1976*	921,323	511,330	409,995	192,570	217,425
1981	968,313	563,166	405,147	180,255	224,892

*Revised by Statistics Canada.

Source: Saskatchewan Bureau of Statistics , Economic Review 1983 (Table 4)

There is a continuing acceleration in the proportion of people entering the labour force, especially among women. With an increasing number of households where both parents are working, there will be a more disposable income for leisure/recreational pursuits, although long duration vacations may be difficult to coordinate.

Employed Labour Force As Percentage of Total Population, Saskatchewan, 1966, 1971, 1976, 1981, 1982, 1983

Year	Total Population	Total Employed Labour Force	Employed (%)
1966	955,400	327,000	34
1971	926,200	334,000	36
1976	921,300	378,000	41
1981	968,300	425,000	44
1982	979,100	426,000	44
1983	992,100	436,000	44

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, TAB: ECONOMIC INDICATORS.

The percentage of women in the employed labour force in Saskatchewan has risen steadily from 18.3% in 1951 to 23.0% in 1961 to 40.0% in 1983.

Employed Women As A Percentage of Employed Labour Force, Saskatchewan, 1975-1982

Year	Employed Labour Force	Employed Women	Women (%)
1975	365,000	122,000	33
1976	378,000	132,000	35
1977	390,000	138,000	35
1978	398,000	143,000	36
1979	411,000	151,000	37
1980	417,000	154,000	37
1981	425,000	162,000	38
1982	426,000	167,000	39
1983	436,000	176,000	40

Source: Statistics Canada, Catalogue 71-201, Historical Labour Force Statistics, 1983, pp. 116 & 118.

Changes in the level of income affect the demand for travel. A rise in personal disposable income has a positive effect upon the demand for travel.

Personal Disposable Income (P.D.I.), Saskatchewan & Canada, 1971-1983

Year	Saskatchewan P.D.I.	Canada P.D.I.
1971	$ 2,202,000,000	$ 59,943,000,000
1972	$ 2,382,000,000	$ 68,100,000,000
1973	$ 3,175,000,000	$ 79,719,000,000
1974	$ 3,821,000,000	$ 94,545,000,000
1975	$ 4,802,000,000	$110,996,000,000
1976	$ 5,130,000,000	$125,309,000,000
1977	$ 5,237,000,000	$138,307,000,000
1978	$ 5,959,000,000	$156,070,000,000
1979	$ 6,778,000,000	$175,956,000,000
1980	$ 7,574,000,000	$199,740,000,000
1981	$ 9,709,000,000	$233,357,000,000
1982	$10,286,000,000	$255,954,000,000
1983	$10,432,000,000	$270,056,000,000

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Indicators, TAB: PERSONAL INCOME, January, 1985.

Personal Income Per Capita, Saskatchewan 1971-1983

Year	Personal Income Per Capita
1971	$ 2,760
1972	$ 3,032
1973	$ 4,058
1974	$ 5,020
1975	$ 6,240
1976	$ 6,661
1977	$ 6,751
1978	$ 7,483
1979	$ 8,340
1980	$ 9,079
1981	$11,540
1982	$12,466
1983	$12,686

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, TAB: PERSONAL INCOME, January, 1985.

Saskatchewan Personal Expenditures
On Recreation, Entertainment, Education
And Cultural Services*, 1971-1983

Year	Expenditures
1971	$199,000,000
1972	$233,000,000
1973	$279,000,000
1974	$333,000,000
1975	$402,000,000
1976	$478,000,000
1977	$491,000,000
1978	$575,000,000
1979	$588,000,000
1980	$633,000,000
1981	$801,000,000
1982	$899,000,000
1983	$989,000,000

*Includes recreational, sporting and camping equipment, books, newspapers and magazines; recreational services as well as educational and cultural services.

Source: Saskatchewan Bureau of Statistics. Saskatchewan Economic Statistics, TAB: PERSONAL EXPENDITURES, January, 1985.

Saskatchewan Household Ownership of Selected Items of Recreational Equipment, 1976-1984*

Recreational Equipment	Year					
	1976	1977	1978	1980	1982	1984
Downhill Skis	32,000	-	21,000	24,000	28,000	31,000
Cross-Country Skis**	-	-	37,000	60,000	61,000	71,000
Snowmobiles	50,000	55,000	54,000	61,000	50,000	n/a
Adult Size Bicycles	115,000	115,000	125,000	138,000	156,000	n/a
Vacation Homes	15,000	-	20,000	21,000	19,000	n/a
Tents	30,000	-	36,000	47,000	72,000	n/a
Tent Trailers	19,000	-	19,000	19,000	18,000	n/a
Travel Trailers	22,000	-	19,000	24,000	23,000	n/a
Truck Campers	11,000	-	13,000	16,000	17,000	n/a
Canoes	9,000	-	14,000	15,000	20,000	n/a
Rowboats, Skiffs and Dories	-	-	-	-	4,000	n/a
Outboard Motors	30,000	-	33,000	41,000	39,000	n/a
Total Households in Saskatchewan	277,000	281,000	292,000	306,000	327,000	355,000

* The 1979, 1981 and 1983 annuals exclude this data; revised estimates included for 1977-1980.
**In 1976, no breakdown is available by type of ski.

Source: Statistics Canada, Catalogue 64-202. Household Facilities and Equipment, May Issue.

Saskatchewan Cabin Type Trailer Registration
1970-71 - December, 1984

Year*	Cabin Type Trailer	Annual Change (%)
1970-71	6,541	-
1971-72	7,637	16.8
1972-73	9,236	20.9
1973-74	10,881	17.8
1974-75	13,013	19.6
1975-76	15,690	20.6
1976-77	18,139	15.6
1977-78	19,490	7.4
1978-79	23,632	21.3
1979-80	20,959	-11.3
1980-81	20,069	-4.2
Jan 1982	21,638	+7.8
Dec 1983	21,804	+0.7
Dec 1984	21,506	-1.4

*From 1970-71 to 1980-81 registrations were based on the fiscal year.

Source: Saskatchewan Auto Fund
Motor Vehicle Division, SGI

Saskatchewan Collapsible Type Trailer Registrations
1970-71 - December, 1984

Year*	Collapsible Type Trailer	Annual Change (%)
1970-71	3,363	-
1971-72	4,564	35.7
1972-73	5,772	26.5
1973-74	7,344	27.2
1974-75	8,995	22.5
1975-76	10,340	15.0
1976-77	11,361	9.9
1977-78	12,220	7.6
1978-79	12,701	3.9
1979-80	10,146	-20.1
1980-81	9,716	-4.2
Jan 1982	9,913	+2.0
Dec 1983	9,459	-4.6
Dec 1984	8,968	-5.2

*From 1970-71 to 1980-81 registrations were based on the fiscal year.

Source: Saskatchewan Auto Fund
Motor Vehicle Division, SGI

Saskatchewan Tent Type Trailer Registrations
1970-71 - December, 1984

Year*	Tent Type Trailer	Annual Change (%)
1970-71	6,042	-
1971-72	6,029	-0.2
1972-73	5,895	-2.2
1973-74	5,540	-6.0
1974-75	5,447	-1.7
1975-76	5,144	-5.6
1976-77	4,526	-12.0
1977-78	4,872	7.6
1978-79	6,421	31.8
1979-80	5,069	-21.1
1980-81	4,837	-4.6
Jan 1982	5,000	+3.4
Dec 1983	4,497	-10.1
Dec 1984	4,192	-6.8

*From 1970-71 to 1980-81 registrations were based on the fiscal year.

Source: Saskatchewan Auto Fund
Motor Vehicle Division, SGI

Saskatchewan Motor Home Registrations
1970-71 - December, 1984

Year*	Mobile Homes	Annual Change (%)
1970-71	0	-
1971-72	1	-
1972-73	531	-
1973-74	1,083	103.9
1974-75	2,509	131.7
1975-76	3,303	31.6
1976-77	3,662	10.9
1977-78	4,121	12.5
1978-79	5,617	36.3
1979-80	6,177	10.0
1980-81	6,109	-1.1
Jan 1982	6,844	+12.0
Dec 1983	6,925	+1.2
Dec 1984	6,133	-11.4

*Prior to 1972-73 no record was kept of mobile home registrations.
From 1972-73 to 1980-81 registrations were based on the fiscal year.

Source: Saskatchewan Auto Fund
Motor Vehicle Division, SGI

Saskatchewan Boat and Utility Trailer Registrations
1970-71 - December, 1984

Year*	Mobile Homes	Annual Change (%)
1970-71	24,924	-
1971-72	28,170	13.0
1972-73	30,268	7.5
1973-74	32,831	8.5
1974-75	36,298	10.6
1975-76	40,079	10.4
1976-77	42,778	6.7
1977-78	45,990	7.5
1978-79	54,112	17.7
1979-80	46,303	-14.4
1980-81	43,483	-6.1
Jan 1982	47,638	+9.5
Dec 1983	50,844	+6.7
Dec 1984	50,456	-0.7

*From 1970-71 to 1980-81, registrations were based on the fiscal year.

Source: Saskatchewan Auto Fund
Motor Vehicle Division, SGI

Passport Applications, Saskatchewan, 1973-1984

Year	Applications
1973	11,491
1974	11,252
1975	11,036
1976	11,276
1977	10,236
1978	10,515
1979	13,949
1980	12,609
1981	11,558
1982	12,960
1983	15,950
1984	16,558

Source: Department of External Affairs, Passport Office, Quarterly Survey of Passport Applications.

Between the period of September to October 1983, over 1,000 households in Saskatchewan were interviewed regarding travel behaviour during the three-month period of July, August and September, 1983. The target population for the survey consisted of all Saskatchewan residents (excluding those in institutions) 15 years of age and over. Data on trip characteristics include main destination, duration, length, purpose and types of accommodation used inside and outside Saskatchewan. Residents' comparison of Saskatchewan with other vacation destinations for specific attributes and the importance to residents of specific types of activities, facilities and attractions in selecting vacation destinations.

In the third quarter (July - September) 1983, Saskatchewan residents made an estimated 2,386,000 person-trips to all main destinations.

Main Destination of Saskatchewan Resident Person-Trips
July - September, 1983

Main Destination	Number of Person-Trips	% of Total
Saskatchewan	1,779,000	74.5
Other Canada Total	507,000	21.2
Alberta	265,000	43.6
Manitoba	103,000	17.0
B.C.	91,000	14.9
Ontario and Quebec	38,000	6.2
Atlantic	9,000	1.4
YT/NWT	3,000	0.4
United States	93,000	3.9
Other Destinations	7,000	0.3

The five main activities in which Saskatchewan residents participated while travelling within the province were, in order of importance: swimming; rural sightseeing; fishing; camping; and city sightseeing.

Number and Percentage of Trips Associated with Each Activity by Saskatchewan Residents within Saskatchewan, July - September, 1983

Activity	No. of Associated Trips	% of Total
Hunting	42,000	2.3
Fishing	452,000	25.4
Wilderness Canoeing	130,000	7.3
Hiking/Trail Riding	237,000	13.3
Swimming	670,000	37.7
Other Water Sports	295,000	16.6
Sailing	85,000	4.8
Camping	431,000	24.2
City Sightseeing	348,000	19.6
Rural Sightseeing	571,000	32.1
Industrial Tours	8,000	0.4
Sporting Events	245,000	13.8
Craft/Art Fairs	126,000	7.1
Festivals/Special Events	137,000	7.7
Historical Sights/Museums	312,000	17.5
Musical Events/Live Theatre	72,000	4.0

Average number of activities per person-trip = 2.34

Source: Saskatchewan Resident Travel Survey, July - September, 1983
Canadian Facts

While travelling outside Saskatchewan, Saskatchewan residents participate in city sightseeing, rural sightseeing, swimming, visiting historical sights and museums and camping.

Number and Percentage of Trips Associated with Each Activity by Saskatchewan Residents When Travelling Out-of-Province, July - September, 1983

Activity	No. of Associated Trips	% of Total
Hunting	3,000	0.6
Fishing	49,000	8.1
Wilderness Canoeing	17,000	2.8
Hiking/Trail Riding	119,000	19.5
Swimming	211,000	34.7
Other Water Sports	57,000	9.4
Sailing	10,000	1.7
Camping	181,000	29.8
City Sightseeing	334,000	54.9
Rural Sightseeing	301,000	49.5
Industrial Tours	44,000	7.2
Sporting Events	93,000	15.3
Craft/Art Fairs	46,000	7.5
Festivals/Special Events	125,000	20.5
Historical Sights/Museums	211,000	34.7
Musical Events/Live Theatre	78,000	12.8

Source: Saskatchewan Resident Travel Survey, July - September 1983
Volume 2: Detailed Tables
Canadian Facts

In order to gain some understanding of the perceptions travellers have of Saskatchewan as a trip destination, respondents were asked about eleven specific attributes. For each, they were asked if Saskatchewan was better than, about the same, or not as good as other vacation destinations.

Perception of Saskatchewan's Attributes Rating by Saskatchewan Travellers During October '82 to Sept. '83

Attribute	Better (%)	Same (%)	Not as Good (%)	Don't Know (%)
Hospitality Services	17.5	65.7	7.0	9.9
City Sightseeing	6.8	42.3	33.9	17.0
Rural Sightseeing	17.0	46.5	23.8	12.6
Parks/Outdoor Recreation	23.3	47.6	15.1	14.0
Historical Sites/Museums	14.0	45.0	18.8	22.2
Hotels	6.2	63.6	8.2	22.0
Restaurants	8.4	66.6	14.0	11.3
Festivals/Special Events	9.5	45.6	17.5	27.4
Night Life	5.4	37.6	29.4	27.6
Wilderness Area Activities	24.6	39.5	13.2	22.7
Value for Vacation Money	20.1	59.4	9.7	10.8

Source: Saskatchewan Resident Travel Survey, July - September, 1983 Canadian Facts.

In order to obtain information on the relative importance of specific attributes (facilities, activities, etc.) in choosing a vacation, respondents were asked to rate each one on a five-point scale, ranging from 5 for 'Very Important' to 1 for 'Not at all Important'.

Hospitality services rank first while restaurants and parks/outdoor recreation share second place followed by rural sightseeing and hotels.

Attribute	Mean Rating for Ten Attributes*
Hospitality Services	4.22
Restaurants	3.91
Parks/Outdoor Recreation	3.91
Hotels	3.52
Rural Sightseeing	3.42
Wilderness Area Activities	3.34
Historical Sites/Museums	3.29
Festivals/Special Events	3.10
City Sightseeing	3.07
Night Life	3.01

*Based on a scale of 5:1 and excluding "Don't Know".

Source: Saskatchewan Resident Travel Survey, July - September, 1983
Canadian Facts.

2.2. Canadian Residents

Canadian residents undertook some 96.8 million person-trips in 1984 which were interprovincial.

Saskatchewan attracted 1.006 million person-trips from non-Saskatchewan Canadians. The origin of these Canadian visitors was as follows: Alberta - 569,000, Manitoba - 258,000, British Columbia - 116,000, Ontario - 53,000 and other Canada - 10,000. These trips accounted for $159 million expenditures in this province.

The majority (94%) of non-Saskatchewan Canadian visits to this province were from the three western provinces of Alberta, Manitoba and British Columbia. The largest number of visitors from the Eastern provinces came from Ontario.

2.3. United States Residents

U.S. residents undertook some 1.069 billion person-trips for tourism related purposes in 1983, of which over 32 million person-trips were made to Canada.

Americans made an estimated 466,000 person-trips to Saskatchewan in 1982. These trips included same day and one or more nights destination-Saskatchewan trips, as well as pass-through traffic. About 66% of these total trips by U.S. residents to Saskatchewan were of one or more nights duration. The average length of stay for all American person-visits to Saskatchewan was about 2.1 days.

The majority of American visitors to Saskatchewan came from North Dakota, Montana and Minnesota.

2.4 Profile of Saskatchewan's Main Seven Market Regions

2.4.1 Market Size

The seven market regions identified account for 83% of all non-resident visitation and 81% of all non-resident expenditures in Saskatchewan (excluding overseas).

Among the seven markets themselves, Alberta is the largest single source of non-resident travel business accounting for over one-third of all non-resident visitation to Saskatchewan and nearly one-third of all non-resident expenditures. Although British Columbia ranks third in terms of person-trip generation to Saskatchewan, it ranks second in terms of expenditure level due to the higher average expenditures per trip made by British Columbians versus per trip expenditures made by Manitobans who rank second in terms of visitation levels. Similarly, Ontario generates high travel expenditures relative to the total visitation levels which it generates.

The three U.S. states studied account for 15% of all non-resident visitation or nearly one-half of all U.S. visitation to Saskatchewan. Montana and North Dakota both generate a significant amount of same day travel to Saskatchewan which accounts for their lower trip expenditures relative to total visitation levels.

Visitations and Expenditures of Seven Study Regions in Terms of Non-Resident Visitation to Saskatchewan (Excludes Overseas)

Source	Visitation (Person-Trips)	Total (%)	Expenditure ($ x 1,000)	Total (%)
Alberta	530,000	35	68,900	31
Manitoba	295,000	19	28,320	13
British Columbia	130,000	9	37,180	17
North Dakota	104,000	7	10,556	5
Ontario	75,000	5	24,000	10
Minnesota	60,000	4	6,090	3
Montana	60,000	4	5,220	2
SUB-TOTAL	1,254,000	83	180,266	81
Other Domestic	22,000	1	25,600	11
Other U.S.	242,000	16	17,492	8
TOTAL	1,518,000	100	223,358	100

2.4.2 Trip Purpose

Most of the travel to Saskatchewan by non-residents is heavily oriented to visiting friends and relatives (VFR). This is particularly true of domestic (other Canadian) non-resident travel to Saskatchewan. Pleasure and personal reasons generally rank second in importance for non-resident travel to Saskatchewan. Manitoba is the most strongly-oriented market for pleasure travel to Saskatchewan with 32% of trips taken to Saskatchewan accounted for by pleasure travel reasons. The three U.S. states are the most heavily oriented to Saskatchewan for pleasure travel in percentage terms, however, in absolute terms the actual number of pleasure travellers received from these markets annually is quite small. Alberta, Manitoba and British Columbia are Saskatchewan's most important business travel markets.

Purpose of Trips to Saskatchewan

Source	VFR	Pleasure/Personal	Business
Alberta	48%	25%	20%
Manitoba	48%	32%	18%
British Columbia	62%	19%	19%
North Dakota	16%	78%	5%
Ontario	74%	16%	10%
Minnesota	6%	86%	7%
Montana	7%	87%	5%

2.4.3 Activities Pursued on Pleasure Trips

Subtle differences exist among these seven market regions in terms of their relative interests in the pleasure travel activities. For example, travellers from British Columbia, North Dakota and Montana appear to be relatively more interested in visiting historic sites as compared to Manitobans, Albertans, Minnesotans and residents of Ontario. Camping is most popular among residents of Montana and Alberta, as is fishing and cross-country skiing. Arts and crafts fairs are most popular among residents of British Columbia and Ontario. Game bird hunting is most popular among residents of Manitoba, North Dakota, Minnesota, Montana and so on.

In terms of Saskatchewan's performance in capturing pleasure trips focussed around certain activities, wide variations exist among the market performance levels of various activities. Saskatchewan's market capture rate is reasonably good for certain activities such as rural and urban sightseeing, camping, fishing, and visiting friends and relatives. In the case of VFR travel that is generally characteristic of the market area's long distance travel patterns. This was found to be the case for example with market regions such as Alberta, British Columbia and Montana.

Interest in Various Pleasure Travel Activities by Market Area
Versus Main Purpose of Activity of Last Pleasure Trip to Saskatchewan

Activities	Alberta		Manitoba		British Columbia		North Dakota		Ontario		Minnesota		Montana	
	1*	2**	1	2	1	2	1	2	1	2	1	2	1	2
Rural Sightseeing	85	26	87	33	83	24	79	39	81	36	80	34	77	50
Historic Sites	78	21	79	20	85	5	88	0	78	10	80	0	88	6
Urban Sightseeing	77	29	80	27	78	24	78	25	79	39	75	27	73	22
Festivals	65	7	66	6	65	2	60	11	68	2	69	0	56	6
Camping	69	25	59	22	61	12	51	11	36	14	48	20	64	11
Water Sports	57	10	52	7	60	7	41	0	40	2	38	0	42	6
Sporting Events	57	8	57	12	49	2	45	0	32	1	45	0	52	11
Musical Events	52	3	53	6	56	2	61	4	61	7	52	0	54	0
Fishing	48	15	48	11	43	12	46	25	22	14	43	19	55	6
Hiking	51	7	37	4	48	7	27	0	29	13	41	15	39	0
Craft/Art Fairs	42	1	42	1	51	5	43	0	47	0	42	0	40	6
Downhill Skiing	38	3	27	3	30	5	21	n/a	17	n/a	22	n/a	29	n/a
Industrial Tours	29	3	33	4	26	3	30	0	22	2	21	0	21	0
Cross-Country Skiing	28	3	28	1	21	3	9	n/a	18	n/a	19	n/a	16	n/a
Sailing	27	1	18	0	24	0	11	0	22	1	15	0	10	0
Snowmobiling	23	1	27	0	7	0	17	n/a	13	n/a	14	n/a	19	n/a
Wilderness Canoeing	20	3	22	0	20	0	12	0	19	8	19	8	16	0
Big Game Hunting	21	1	21	4	15	2	19	0	7	0	17	6	31	6
Game Bird Hunting	18	7	21	0	13	2	22	0	8	1	20	0	20	6
Visiting Friends/ Relatives	34	44	38	31	37	44	15+	7	34	13	6+	6	7+	22

* Interest in Pleasure Travel Activities in Market Generally for Market Region.
**Main Purpose or Activity Pursued on Last Pleasure Trip to Saskatchewan by Market Region.
+ On Pleasure Trips to Canada Only.

Source: DMCA/Criterion (1984) and Mid-Continent (1983) Travel Market Surveys.

Saskatchewan's performance in generating pleasure travel from certain other activities, varies widely among the seven markets. Among travel related to historic site visitation, for example, Saskatchewan does far better in the Alberta and Manitoba markets than it does in the other five. Festivals appear to be a stronger motivation for pleasure travel to Saskatchewan from North Dakota as compared to the other six market regions. Water sport activity travel is mostly captured from Alberta. Manitoba and Montana are more strongly oriented toward Saskatchewan for attending sporting events. Hiking and wilderness canoeing are relatively more popular pleasure travel pursuits in Saskatchewan among residents of Ontario and Minnesota, and hunting is a more popular activity in Saskatchewan among Albertans, Minnesotans and residents of Montana.

Caution must be used in interpreting these statistics, however, for two reasons. Firstly, the sample size is quite small to be highly reliable at the activity level and, secondly, they represent only a snapshot based on one year of travel activity rather than an analysis of trends over some given time period.

3. TRAVEL TO AND WITHIN SASKATCHEWAN

3.1. An Overview[1]

During the period January 1 - December 31, 1984, there were 6,563,000 person-trips undertaken to and within Saskatchewan by Canadians. Of this total, 5,557,000 person-trips (84.7%) were accounted for by Saskatchewan residents while 1,006,000 person-trips (15.3%) were trips by Canadians from other provinces.

The primary reason for travelling to and within Saskatchewan during 1982 was for purposes of visiting friends and relatives (36.4%), followed by pleasure trips (26.0%) and personal reasons (19.1%). Travel for business purposes accounted for 17.4% of person-trips.

Over 38% of all person-trips to and within Saskatchewan were for day purpose or "pass-through" reasons.

The vast majority (93.6%) of person-trips undertaken to and within Saskatchewan were by automobile.

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(1) Preliminary results - subject to revision.
Unpublished Travel Survey Data.

The Travel Price Index has been rising at a faster rate than the Consumer Price Index. In effect, the cost of travel, meals, and accommodation has been increasing more than the overall cost of living.

Comparison of The Canadian Travel Price Index
To the Regina and Saskatoon
Consumer Price Index, 1981 - 1984

Year	Consumer Price Index		Travel Price Index
	Regina	Saskatoon	
1981	100.0	100.0	100.0
1982	109.0	109.0	114.1
1983	116.0	115.9	120.4
1984	121.1	120.0	126.3

Notes:
(1) The Travel Price Index and CPI is based on 1981 = 100.
(2) The Travel Price Index weightings in the above table have been updated to 1979-80 by Statistics Canada.

Source: Statistics Canada, Catalogue 62-010, Consumer Prices and Price Indexes, October - December, 1984.

3.2. Travel in Saskatchewan by Saskatchewan Residents

Saskatchewan residents are the predominant consumers of Saskatchewan's tourism and recreation facilities and services.

Number of Person-Trips Within Saskatchewan
By Residents For Tourism Related Purposes, 1979-1980, 1982, 1984

Year*	Person-Trips
1979	5,466,000
1980	6,094,000
1982	5,944,000
1984**	5,557,000

* Statistics are not given for 1981 and 1983 as data was only collected for some quarters of these years.
**Preliminary

Source: Statistics Canada, Canadian Travel Survey (Saskatchewan Tabulations - Unpublished) for 1979 - 1982.

Number of Person-Trips By Residents Within Saskatchewan
By Trip Purpose, 1979-1982

Year	Trip Purpose				Total
	Business	V.F.R*	Pleasure/Personal	Not Stated	
1979	1,260,000	1,822,000	2,333,000	51,000	5,466,000
1980	1,391,000	1,914,000	2,754,000	35,000	6,094,000
1982	1,429,000	1,731,000	2,772,000	12,000	5,944,000
1984	**	**	**	**	5,557,000

* V.F.R. means "visits to friends and relatives".
**Currently not available.

Source: Statistics Canada, Canadian Travel Survey (Saskatchewan Tabulations - Unpublished).

Travel Expenditures in Saskatchewan
By Saskatchewan Residents, 1971-1983

Year	Expenditures
1971	$159,000,000
1972	$172,000,000
1973	$230,000,000
1974	$278,000,000
1975	$346,000,000
1976	$378,000,000
1977	$381,000,000
1978	$426,000,000
1979	$486,000,000
1980	$536,000,000
1981	$692,000,000
1982	$745,000,000
1983	$755,000,000

Source: Saskatchewan Tourism and Small Business, Business Information and Research Branch (Unpublished).

In passenger transportation, the private automobile plays the most dominant role in moving travellers to and within Saskatchewan.

Mode of Transport of Saskatchewan
Residents Travelling In Saskatchewan
For Tourism Related Purposes, 1982

Mode	Person-Trips (%)
Automobile	95.3
Air	0.3
Bus	3.6
Other	1.3

Source: Statistics Canada, Canadian Travel Survey, Canadian Destinations Only (Printout).

3.3. Travel in Saskatchewan by Canadians not Resident in Saskatchewan

Canadians from other provinces constitute the second largest consumer group of Saskatchewan's tourism services and facilities. In 1982, Saskatchewan hosted 1,048,000 visitors from other Canadian provinces. Alberta and Manitoba contribute the greatest proportion of Canadian visitors to this province.

Number of Person-Trips to Saskatchewan
By Non-Saskatchewan Canadians, 1979-1980, 1982, 1984

Year	Person-Trips
1979	1,045,000
1980	1,085,000
1982	1,048,000
1984**	1,006,000

* Statistics are not given for 1981 and 1983 because data was only collected for some quarters of these years.
**Preliminary.

Source: Statistics Canada, Canadian Travel Survey (Canadian Destinations Only - Printout) for 1979-1982.

Number of Person-Trips to Saskatchewan
by Origin of Canadian Visitors, 1984

Origin	Person-Trips
Alberta	569,000
Manitoba	258,000
British Columbia	116,000
Other Canada	63,000
Total	1,006,000

Source: Preliminary Results - Unpublished - Travel Survey Data.

Tourism Expenditure in Saskatchewan
By Non-Saskatchewan Canadians, 1971-1983

Year	Expenditures
1971	$ 35,000,000
1972	$ 40,000,000
1973	$ 47,000,000
1974	$ 56,000,000
1975	$ 65,000,000
1976	$ 74,000,000
1977	$ 82,000,000
1978	$ 92,000,000
1979	$104,000,000
1980	$118,000,000
1981	$137,000,000
1982	$151,000,000
1983	$159,000,000

Source: Saskatchewan Bureau of Statistics,
Saskatchewan Economic Statistics, TAB: EXPORTS

The most popular air destinations to Regina and Saskatoon are displayed in the following tables.

Inbound Passengers, Regina Airport, Saskatchewan, 1976-1982

From	1976	1977	1978	1979	1980	1981	1982
Calgary	39,980	33,300	35,480	38,730	43,780	41,240	40,110
Edmonton	24,370	21,300	24,060	23,480	27,330	25,290	22,910
Halifax	1,870	1,850	2,630	3,050	3,500	3,240	2,800
London	1,680	1,260	1,760	3,950	1,650	1,650	960
Montreal	7,590	6,950	7,630	9,910	8,940	8,180	8,180
Ottawa	11,110	10,030	12,140	11,930	12,250	12,240	12,330
Toronto	34,250	30,110	34,500	41,440	41,880	39,130	43,500
Vancouver	32,580	26,330	30,820	38,250	38,860	34,320	37,540
Winnipeg	30,040	27,980	27,430	29,730	29,910	29,800	27,480
Victoria	6,820	4,870	6,600	9,270	8,290	6,940	6,440
Windsor	1,390	1,540	1,700	3,460	2,050	1,330	1,060
Other Canada	13,690	13,030	15,500	22,700	20,270	17,080	14,110
U.S.A.	15,940	17,570	21,290	21,320	21,260	21,750	20,380
Total	221,310	196,120	221,540	257,220	259,970	242,190	237,800

Inbound Passengers, Saskatoon Airport, Saskatchewan, 1976-1982

From	1976	1977	1978	1979	1980	1981	1982
Calgary	25,850	23,570	24,950	29,360	32,390	31,430	31,610
Edmonton	16,400	15,770	17,110	18,380	20,140	19,240	17,320
London	1,460	1,140	1,690	3,380	2,000	1,570	1,000
Montreal	5,150	5,230	6,280	9,620	8,550	7,410	7,110
Ottawa	8,890	7,720	8,750	10,740	10,740	11,830	10,540
Toronto	24,380	23,150	26,840	36,490	37,050	35,950	39,710
Vancouver	29,240	24,290	26,770	34,400	39,380	36,530	38,770
Victoria	5,930	4,290	6,290	8,250	7,110	6,990	7,540
Winnipeg	30,340	29,260	30,040	32,000	36,300	34,830	34,680
Other Canada	15,400	14,270	17,940	32,940	25,950	39,780	18,850
U.S.A.	14,780	17,400	21,920	20,500	23,390	20,990	19,340
Total	177,820	166,090	188,580	236,060	243,000	229,860	226,470

Source: Statistics Canada, Catalogue 51-204, Air Passenger Origin and Destination - Domestic Report (Table 4).

Statistics Canada, Catalogue 51-205, Air Passenger Origin and Destination - Canada-United States Report (Table 4).

3.4. Travel in Saskatchewan by American Residents

The third major tourist market to Saskatchewan is from the United States.

U.S. Resident Direct Entries to Saskatchewan
Across the U.S./Saskatchewan Border, 1972-1984

Year	U.S. Resident Entries	Change (%)
1972	277,328	-
1973	254,530	- 8.0
1974	230,396	- 9.5
1975	233,623	+ 1.4
1976	234,355	+ 0.3
1977	228,838	- 2.4
1978	207,529	- 9.3
1979	181,595	-12.5
1980	182,531	+ 0.5
1981	193,359	+ 6.0
1982	179,770	- 7.0
1983	175,070	- 2.6
1984	166,136	-5.1

Source: Statistics Canada, Catalogue 66-001, Travel Between Canada and Other Countries, October-December Issue.

Direct U.S. entries to Saskatchewan constitute only one part of total U.S. visitations to the province. U.S. visitors to the province also enter Saskatchewan from Manitoba and Alberta. For example, in 1980, 74,719 U.S. residents entered Saskatchewan via the Trans-Canada during the three month period of June, July and August. During the same period in 1981, 85,069 U.S. residents entered Saskatchewan via the Trans-Canada. (Source: Out-of-Province Census of Tourist Traffic - Saskatchewan Tourism and Renewable Resources).

Tourism consultants hired by Saskatchewan Tourism and Small Business estimated that in 1982 Saskatchewan hosted 466,000 U.S. visitors.

Tourism Expenditures in Saskatchewan
By U.S. Residents, 1971-1983

Year	Expenditures
1971	$ 9,800,000
1972	$10,200,000
1973	$13,900,000
1974	$10,600,000
1975	$12,000,000
1976	$16,200,000
1977	$18,300,000
1978	$22,800,000
1979	$26,000,000
1980	$29,400,000
1981	$34,500,000
1982	$33,200,000
1983	$35,900,000

Source: Saskatchewan Bureau of Statistics (Unpublished).

3.5. Travel in Saskatchewan by Residents of Countries Other Than Canada and the United States

Residents of countries other than the U.S. and Canada constitute the smallest tourism market to Saskatchewan.

In 1980, approximately 39,000 visitors from "other" countries stayed one or more nights in Saskatchewan. This figure dropped to approximately 36,000 in 1981.

Visitors to Saskatchewan From Countries Other than Canada and the U.S.A., 1980

Country	Business	V.F.R.*	Pleasure	V.F.R.* Pleasure	Other	Total
Belgium	34	46	55	37	-	172
France	143	478	710	342	29	1,702
Italy	142	307	-	-	-	449
Netherlands	-	824	520	1,332	-	2,676
Scandinavia	98	1,272	22	170	27	1,589
Switzerland	31	388	371	241	-	1,031
United Kingdom	469	7,801	2,717	5,181	431	16,599
West Germany	471	1,935	3,334	2,021	316	8,078
Australia	165	692	983	364	112	2,316
New Zealand	16	302	274	93	-	684
Mexico	-	799	60	-	-	859
Japan	682	938	435	-	998	3,054
Total	2,251	15,782	9,481	9,781	1,913	39,209

*V.F.R. means "visits to friends and relatives".

Source: Canadian Government Office of Tourism, Corporate Affairs Directorate, Research and Analysis Division, Regional Data Base Tourism, March, 1983.

Visitors to Saskatchewan From Countries Other than Canada and the U.S.A., 1981

Country	Business	V.F.R.*	Pleasure	V.F.R.* Pleasure	Other	Total
Belgium	-	108	43	56	-	207
France	218	598	656	455	-	1,927
Italy	81	386	677	-	55	1,199
Netherlands	-	831	803	1,318	260	3,212
Scandinavia	68	1,007	117	498	114	1,804
Switzerland	28	214	466	170	57	935
United Kingdom	684	7,515	3,426	4,016	228	15,869
West Germany	332	2,432	2,258	1,187	393	6,603
Australia	262	403	842	135	57	1,698
New Zealand	-	118	204	157	-	480
Mexico	51	-	162	-	-	213
Japan	928	516	140		364	1,948
Total	2,652	14,128	9,794	7,992	1,528	36,095

*V.F.R. means "visits to friends and relatives".

Source: Canadian Government Office of Tourism, Corporate Affairs Directorate, Research and Analysis Division, Regional Data Base Tourism, March, 1983.

Tourism expenditures to Saskatchewan from visitors of these other countries in 1983 are estimated at $ 17.1 million.

Tourism Receipts to Saskatchewan From Countries Other than Canada and the U.S.A., 1971-1983

Year	Expenditures
1971	$ 1,400,000
1972	$ 2,100,000
1973	$ 2,600,000
1974	$ 2,900,000
1975	$ 4,300,000
1976	$ 7,000,000
1977	$ 6,000,000
1978	$10,100,000
1979	$13,900,000
1980	$17,000,000
1981	$17,600,000
1982	$18,800,000
1983	$17,100,000

Source: Saskatchewan Bureau of Statistics (Unpublished).

4. TOURISM RESOURCES

4.1. Provincial Parks

There are seventeen (17) provincial parks in the province. The total area of these parks is 720,964.92 hectares. The largest provincial park is Lac La Ronge with 376,842.33 hectares.

Provincial Parks in Saskatchewan

Provincial Park*	Year Established	Square Miles	Acres	Hectares
1. The Battlefords	1960	2.30	1,472.0	595.71
2. Buffalo Pound	1963	7.44	4,761.6	1,927.00
3. Cypress Hills	1931	70.32	45,002.5	18,211.82
4. Danielson	1971	11.25	7,200.0	2,913.80
5. Douglas	1973	17.12	10,956.8	4,424.16
6. Duck Mountain	1931	101.00	64,640.0	26,159.45
7. Echo Valley	1960	2.50	1,598.1	646.74
8. Good Spirit Lake	1931	7.84	5,019.6	2,031.40
9. Greenwater	1932	72.02	46,092.5	18,653.38
10. Lac La Ronge	1939	1,455.00	931,200.0	376,842.33
11. Meadow Lake	1959	606.06	387,872.0	156,969.64
12. Moose Mountain	1931	154.25	98,720.0	39,951.44
13. Nipawin	1934	252.00	161,280.0	65,269.12
14. Pike Lake	1960	1.93	1,235.2	499.88
15. Rowan's Ravine	1960	1.05	672.0	271.96
16. Saskatchewan Landing	1973	21.61	13,830.4	5,597.09
Total		2,783.69	1,781,552.7	720,964.92

*Katepwa Point not included.

Source: Saskatchewan Parks and Renewable Resources, Statistics and Evaluation, Inventory Listing, November, 1983.

Provincial parks provide a wide range of recreational and commercial facilities during the summer as well as during the winter.

Selected Recreational Facilities In Provincial Parks

Provincial Park*	Facilities+														
	Trails-Summer (km)			Water Recreation			Tennis & Golf			Snow Trails		Campsites			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
The Battlefords	-	-	-	1	350	-	-	-	x	9	13	68	345	x	45
Buffalo Pound	5.8	2.4	8	1	1,250	-	2	-	-	10	5	49	154	x	54
Cypress Hills	Yes	5.6	8	1	80	x	2	x	-	413	12	133	266	x	200
Danielson	-	-	-	3	150	-	-	-	-	-	-	26	67	x	30
Douglas	-	-	-	-	152	-	-	-	-	-	-	26	48	x	25
Duck Mountain	6.0	2.0	15	4	528	x	2	-	x	92	40	85	274	-	-
Echo Valley	9.8	-	-	2	428	-	-	-	-	-	10	121	193	x	126
Good Spirit	1.0	1.0	4	2	130	x	2	-	-	21	14	40	47	x	128
Greenwater	-	2.8	4	2	169	x	1	x	-	52	8	86	50	x	51
La Ronge	23.5	23.5	-	7	365	x	-	-	-	100	46	17	253	-	16
Meadow Lake	3.0	3.0	-	16	3,312	x	2	-	-	-	15	106	566	x	71
Moose Mtn.	45.8	1.9	20	3	400	-	1	-	x	118	52	131	202	x	50
Nipawin	160.0	160.0	-	9	200	x	-	-	-	160	40	-	82	-	25
Pike Lake	-	3.5	-	1	400	x	2	x	-	-	-	90	97	x	15
Rowan's Ravine	-	-	-	1	274	-	-	-	-	-	4	59	303	x	1
Sask. Landing	1.0	3.2	-	1	3,962	-	-	-	-	8	-	42	89	x	-

* Katepwa Point is not included.

\+ Facility Code: Trails Summer: 1 - Hiking; 2 - Nature; 3 - Equestrian;
Water Recreation: 4 - Boat Launches; 5 - Swimming Beach (m); 6 - Boat Rentals;
Tennis & Golf: 7 - Tennis Courts; 8 - 9 Hole; 9 - 18 Hole;
Snow Trails: 10 - Snowmobile Trails(km); 11 - X-Country Trails(km)**
Campsites: 12 - Serviced; 13 - Unserviced; 14 - Group; 15 - Overflow.

**In addition, downhill skiing is available in Cypress Hills, Buffalo Pound and Duck Mountain Provincial Parks.

Source: Saskatchewan Parks & Renewable Resources, 1982 Visitation and Outdoor Recreation Statistical Report (Recreational Table Summaries by Region & Campground Summary Tables by Park).

Vehicle Entries to Provincial Parks, 1982 - 1984

Provincial Park	Number of Vehicles 1982	1983	1984
The Battlefords	58,164	65,281	57,149
Buffalo Pound	40,973	33,139	37,285
Cypress Hills	74,969	73,402	63,306
Danielson	39,692	32,899	36,048
Douglas	23,906	21,217	22,531
Duck Mountain	85,122	101,272	81,332
Echo Valley	52,940	54,502	66,959
Good Spirit Lake	33,763	31,576	36,671
Greenwater	22,562	27,050	17,362
Katepwa Point	14,716	11,231	13,921
La Ronge	5,060	19,179*	42,188
Meadow Lake	78,735	75,535	79,154
Moose Mountain	143,681	130,857	146,495
Nipawin	17,562	12,377	12,498
Pike Lake	47,126	38,442	32,164
Rowan's Ravine	40,062	26,675	26,557
Saskatchewan Landing	45,042	53,253	51,047
Total	824,075	807,887	822,667
Percentage Change	-	-2.0	+1.8

*Two more counters than in 1982.

Source: Saskatchewan Parks and Renewable Resources, 1984 Visitations and Outdoor Recreation Statistical Report, p. 16.

Origin: Percent of Campers 1984

Provincial Park	Saskatchewan	Other Canadian	American	Other
Buffalo Pound	87.1	9.6	3.0	0.3
Cypress Hills	66.1	32.1	1.7	0.3
Danielson	75.2	24.1	0.7	-
Douglas	86.3	12.0	1.7	-
Duck Mountain	72.7	26.9	0.4	-
Echo Valley	89.1	9.1	1.7	0.1
Good Spirit Lake	93.9	5.2	0.8	0.1
Greenwater Lake	94.4	5.1	0.4	0.1
Lac La Ronge	76.6	11.9	11.1	0.4
Meadow Lake	48.5	50.9	0.4	0.2
Moose Mountain	72.7	22.1	4.9	0.3
Nipawin	95.8	3.6	0.5	0.1
Pike Lake	90.9	7.9	1.2	-
Rowan's Ravine	96.6	3.0	0.4	-
Saskatchewan Landing	83.2	14.2	2.5	0.1
The Battlefords	80.8	18.5	0.6	0.1
Total	77.2	21.0	1.7	0.1

Permits Issued (1984) - 95,710
Permits Days (1984) - 190,893
Camper Days (1984) - 704,797
Average Length of Stay (1984) - 2.1
Average Size of Camper Group (1984) - 3.6

Source: Saskatchewan Parks and Renewable Resources (Unpublished).

Although there is excess camping capacity available in provincial parks, this excess capacity occurs only during certain periods of the season. The demand for campgrounds in most provincial parks exceeds capacity during weekends, long-weekends, and the period July 1 to August 15.

Occupancy Rates of Provincial Parks
May - September, 1982

Provincial Park	Monthly Occupancy Rates					
	May	June	July	Aug.	Sept.	Average
The Battlefords	10.5%	26.0%	65.1%	44.5%	17.3%	40.1%
Buffalo Pound	19.0%	20.1%	40.1%	47.5%	15.5%	33.1%
Cypress Hills	14.2%	18.2%	72.9%	60.2%	24.3%	45.3%
Danielson	22.0%	20.4%	37.4%	39.9%	27.2%	31.2%
Douglas	18.1%	28.0%	58.4%	51.6%	22.5%	41.8%
Duck Mountain	8.2%	14.2%	79.9%	35.1%	6.4%	37.5%
Echo Valley	17.8%	17.0%	43.1%	27.9%	28.2%	29.6%
Good Spirit Lake	16.7%	28.4%	89.2%	91.7%	16.7%	61.4%
Greenwater	19.4%	44.8%	95.5%	52.7%	10.8%	56.7%
Katepwa Point	- - - - - - - - - - No Camping - - - - - - - - - -					
La Ronge	- - - - - - - - No Data Available - - - - - - - -					
Meadow Lake	11.9%	14.3%	53.5%	34.1%	13.0%	30.6%
Moose Mountain	21.6%	30.6%	105.2%	58.8%	20.3%	58.0%
Nipawin	- - - - - - - - No Data Available - - - - - - - -					
Pike Lake	16.8%	27.4%	55.0%	28.6%	6.4%	33.2%
Rowan's Ravine	9.5%	29.3%	64.5%	27.4%	18.3%	37.3%
Saskatchewan Landing	4.6%	16.5%	73.8%	54.9%	37.4%	43.3%

Source: Saskatchewan Parks and Renewable Resources, 1982 Visitations and Outdoor Recreation Statistical Report (Campground Occupancy Table by Park).

4.2. Recreation Areas

Selected Major Saskatchewan Recreation Areas

Recreation Area	Year Established	Square Miles	Acres	Hectares
1. Anglin Lake	1956-75	1.48	950.0	384.61
2. Blackstrap Lake	1968	2.03	1,300.0	526.31
3. Boundry Dam	1964	0.03	20.0	8.10
4. Bronson Forest	1974	40.69	26,040.0	10,542.51
5. Candle Lake	1953-73	2.97	1,900.0	769.23
6. Chitek Lake	1968	2.31	1,480.0	599.19
7. Christopher Lake	1960	0.02	12.0	4.86
8. Coldwell Park	1962	0.24	156.0	63.16
9. Condie Reservoir	1966	1.13	720.0	291.50
10. Crooked Lake	1965	1.00	637.7	258.18
11. Cypress Lake	1976	0.20	128.0	51.82
12. Delaronde Lake	1980	0.50	318.0	128.74
13. Denare Beach	1937	0.02	10.0	4.05
14. Elbow	1974	0.43	275.5	111.53
15. Emma Lake	1960	0.70	450.0	182.19
16. Etters' Beach	-	0.57	363.8	147.29
17. Jan Lake	1962	0.28	176.7	71.53
18. Lac Eauclaire	1972	3.50	2,240.0	906.88
19. Little Bear Lake	1954	0.03	20.0	8.10
20. Lovering Lake	1973	0.65	414.0	167.61
21. Lower Fishing Lake	1955	0.05	30.0	12.15
22. Makwa Lake	1960-80	9.87	6,318.0	2,557.89
23. McBride Lake	1959	0.24	155.0	62.75
24. Moose Jaw Wild Animal Park	1975	0.84	540.0	218.62
25. Nesset Lake	1966	1.64	1,050.0	425.10
26. Nesslin Lake	1965-74	0.34	215.0	87.04
27. Otopasoo Trails	1979	0.47	299.0	121.05
28. Parr Hill Lake	1960	0.00	1.0	0.40
29. Round Lake	1978	0.00	3.0	1.21
30. Ruby Lake	1977	0.00	4.0	1.62
31. Shell Lake	1962	0.47	300.0	121.46
32. Squaw Rapids	1967	0.63	400.0	161.94
33. Turtle Lake	-	0.42	268.0	108.50
34. Valley Centre	1947	0.31	200.0	80.97
35. Wascana Trails	1974	0.51	323.3	130.89
36. Whelan Bay	1960	0.05	30.0	12.15
37. Woody River	-	60.00	38,400.0	15,546.56
Total		80.62	86,148.0	34,877.69

Source: Saskatchewan Parks and Renewable Resources, Communication Services Branch, Research and Evaluation, Inventory, November, 1983.

Vehicle Entries to Major Recreation Areas, 1982-1984

Recreation Sites	1982	1983	1984
Anglin Lake	24,458	19,810	23,855
Blackstrap Lake	17,891	19,032	15,345
Boundary Dam	-	12,501**	11,107
Bronson Forest	28,937**	24,579	26,123
Candle Lake	237,536**	137,669**	158,564
Chitek Lake	18,960	16,059	17,392
Coldwell Park	5,852	7,220	4,101
Condie Reservoir	3,853	5,121	3,716
Crooked Lake	15,959	13,362	24,162
Cypress Lake	2,669	2,848	2,127
Delaronde Lake	4,783	8,357	12,758
Elbow Harbour	23,608	15,815	12,498
Emma Lake	15,615**	33,680	15,855
Etter's Beach	8,310*	6,879	9,191
Jan Lake	18,905	17,878**	21,042
Lac Eauclaire	-	2,359**	5,967
Little Bear Lake	15,843	7,076	19,407
Makwa Lake	121,949**	86,455	100,519
McBride Lake	6,041	11,187	8,435
Moose Jaw Wild Animal Park	18,887	24,339	22,954
Otapasso Trails	-	2,982	2,473
Parr Hill	-	-	3,954
Ramsey Bay	11,380**	14,954**	8,881
Round Lake	-	3,693**	-
Ruby Lake	-	-	8,758
Squaw Rapids	-	-	-
Turtle Lake	11,761	13,753	20,714
Valley Centre	20,388	19,116	24,955
Whelan Bay	14,509**	9,417	14,746
Woody River	5,173	5,707	7,390
Total	653,367	541,848	606,989
Number of Locations	(23)	(27)	(28)

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* Estimated.
**Partially estimated.

Source: Saskatchewan Parks and Renewable Resources, 1984 Visitation and Outdoor Recreation Statistical Report.

Campground Occupancy in Selected Provincial Recreation Areas, 1982

Recreation Area	Occupancy (%)
Anglin Lake	25.8
Blackstrap Lake	9.0
Candle Lake	42.8
Chitek Lake	40.4
Crooked Lake	35.1
Emma Lake	40.3
Etters Beach	10.1
Delaronde Lake	12.5
Nesslin Lake	37.9
Turtle Lake	52.5
Nisbet Forest	61.5
Roche Percee	11.0
Lac Eauclaire	19.1
Squaw Rapids	33.9
Valley Centre	21.7

Source: Saskatchewan Parks and Renewable Resources, 1982 Visitations and Outdoor Recreation Statistical Report (Campground Occupancy Tables by Site).

Number of Vehicle Entries to Trans-Canada and Yellowhead Route Highway Campground Sites, 1982-1984

Trans-Canada Hwy Sites	Number of Vehicles 1982	1983	1984
Besant	12,640	15,183	16,102
Maple Creek	15,899	13,276	14,546
McLean	12,743	12,317	8,862
Moosomin	12,098	10,689	16,026
Sub-Total	53,380	51,465	55,536
Yellowhead Route Hwy Sites			
Borden Bridge	21,818	8,957	5,368
Churchbridge	7,397	1,047	7,805
Eiling Kramer	12,580	13,741	10,600
Lanigan	1,199	7,680	7,997
Maidstone	10,370	6,566	5,207
Sub-Total	53,364	37,991	36,977
Total	106,744	89,456	92,513
Percentage Change	-	-16.2%	+3.4%

Source: Saskatchewan Parks and Renewable Resources, 1983 Visitations and Outdoor Recreation Statistical Report, p. 19.

Occupancy Rates in Trans-Canada and Yellowhead Route Highway Campground Sites, 1982

Trans-Canada Hwy Sites	Occupancy (%)
Besant	49.2
Maple Creek	43.3
McLean	20.4
Moosomin	29.0
Yellowhead Route Hwy Sites	
Borden Bridge	33.2
Churchbridge	17.4
Eiling Kramer	22.6
Lanigan	n/a
Maidstone	24.2

Source: Saskatchewan Parks and Renewable Resources, 1982 Visitations and Outdoor Recreation Statistical Report, (Campground Occupancy Tables by Site).

4.3. Regional Parks

There also exists a network of 101 Regional Parks across the province. The vast majority of Regional Parks provide camping, picnic, swimming and playground facilities. Many of the Regional Parks also maintain golf courses.

4.4. National Park

Visitors to Prince Albert National Park, 1980-1984

Year	Visitors	Change (%)
1980	227,283	-
1981	269,834	+18.7
1982	236,425	-12.4
1983	287,025	+21.4
1984	259,828	-9.5

Source: Parks Canada, Program Management Directorate, Socio-Economic Branch, Attendance at the National Parks and National Historic Sites (Monthly Report) December Issues.

The number of camping parties in Prince Albert National Park are as follows:

Number of Camping Parties, Prince Albert National Park, 1975-1984

Year	Camping Parties
1975	22,166
1976	26,243
1977	28,472
1978	28,403
1979	30,403
1980	29,305
1981	33,058
1982	34,170
1983	n/a
1984	32,243

Source: Prince Albert National Park (Unpublished).

4.5. Events

Events have always figured prominently in Saskatchewan's history and culture. Some of the reasons for this are:

- Saskatchewan has over 500 communities, several of which host events of one form or another throughout the year, although the majority are concentrated in summer.

- Saskatchewan has a long tradition rooted in community life and historically communities have maintained a strong sense of identity. A community's annual events are often a celebration of these traditions.

Events can be classified as of local, regional, provincial, national or international significance.

The classification is based on such factors as:

- catchment of visitors to these events;
- number of visitors to these events;
- proportion of Saskatchewan residents to out-of-province visitors at these events.

Events in general can be described as 'travel generators'. They have the ability to attract tourists. The ability of an event to attract tourists depends in part on the type, theme, and duration of the event.

Current estimations indicate that there are approximately 500 annual events in the province. Many of these are of local interest, such as baseball tournaments and fowl suppers. Regina's Buffalo Days and Saskatoon's Pioneer Days are of provincial significance while events such as Agribition and the Farm Progress Show are gaining international attention.

The Governments of Saskatchewan and Canada retained a consulting firm to determine the economic impact of events at the community level and the ability of these events to attract visitors.

A total of 26 events were selected for the field interview survey. The survey results indicate that events are attended by approximately 1.7 million people annually. Total tourism impact associated with all Saskatchewan events is $140.2 million, or 14% of total tourism expenditures in Saskatchewan. The average per person expenditure was $175.87. For every $24.72 events receive from tourists the community receives $151.75.

Sporting events have the highest average trip expenditure at $344.09.

The largest out-of-province market for Saskatchewan events is the Province of Alberta, accounting for 10.3% of tourism travel to all events.

Conventions constitute a special form of event and have a signficant role in Saskatchewan's tourism, particularly in Regina and Saskatoon.

Number of Conventions and Delegates
To Regina, 1976-1984

Year	Conventions	Delegates
1976	147	21,965
1977	94	24,545
1978	112	37,198
1979	117	48,179
1980	130	39,364
1981	135	29,352
1982	165	44,635
1983	n/a	n/a
1984	194	38,671

Source: Regina Tourist and Convention Bureau (Unpublished).

Number of Conventions and Delegates to Saskatoon
1976-1984

Year	Conventions	Delegates
1976	102	25,058
1977	129	38,000
1978	158	43,584
1979	135	49,943
1980	126	43,005
1981	103	39,140
1982	101	40,842
1983	n/a	41,270
1984	122	42,700

Source: Saskatoon Tourist and Convention Bureau (Unpublished).

4.6. Attractions - An Overview

Attractions, by definition, tend to be of permanent construction and seldom change in basic design. They have the capability to create an interest thus attracting tourists to visit the area. There are 535 identified attractions in Saskatchewan.

4.6.1. Historic Sites

Historic buildings such as civic buildings, churches and museums are the most common form of attractions in the architectural man-made attractions. Within the province there are 99 historical attractions. These include Fort Walsh, Fort Battleford and Batoche National Historic Park.

Visitations to National Historic Sites
1980-1984

Year	Fort Walsh	Battleford	Batoche
1980	30,292	47,214	25,901
1981	33,364	41,280	23,727
1982	30,051	37,578	22,924
1983	29,056	38,955	25,818
1984	22,586	29,860	27,582

Source: Parks Canada, Program Management Directorate, Socio-Economic Branch, Attendance at the National Parks and National Historic Sites (Monthly Report), December Issues.

Vehicles Entering Provincial Historic Sites,
1980-1984

Year	Fort Carlton	Cannington Manor	Wood Mtn.	Last Mtn. House
1980	16,700	11,252	2,595	3,350
1981	12,275	9,967	1,355	2,020
1982	13,779	13,008	1,190	n/a
1983	15,593	11,205	1,525	n/a
1984	12,960	11,455	1,295	3,070

Source: Saskatchewan Parks and Renewable Resources 1984 Visitation and Outdoor Recreation Statistical Report.

4.6.2. Museums

There are over 170 museums in the province. The majority of these museums are of local or regional nature. Sixteen of these museums are considered to be provincial or national class. Some of these: are the Western Development Museums (Yorkton, Moose Jaw, Saskatoon and North Battleford), The John G. Diefenbaker Centre (Saskatoon), the Saskatchewan Museum of Natural History (Regina), and the R.C.M.P. Museum (Regina).

Visitations to the Western Development Museums, 1978-79 - 1984-85

Year	Visitors
1978-79	168,995
1979-80	206,236
1980-81	225,957
1981-82	178,937
1982-83	214,866
1983-84	205,883
1984-85	205,485

Source: Saskatchewan Western Development Museums, Attendance Reports (March 31 Reports).

Visitations to The John G. Diefenbaker Centre, 1981-1983*

Year	Visitors (estimated)
1981	26,200
1982	24,000
1983	27,000

*The Centre was officially opened in June, 1980.

Source: Director, The John G. Diefenbaker Centre (Unpublished).

Visitations to the R.C.M.P. Museum, 1973-1984

Year	Visitors
1973	131,888
1974	101,420
1975	111,597
1976	105,975
1977	113,187
1978	132,790
1979	159,020
1980	204,184
1981	212,553
1982	240,109
1983	164,903
1984	165,549

Source: Director, R.C.M.P. Museum (Unpublished).

Saskatchewan Museum of Natural History, 1978-79 - 1984-85

Year	Visitors
1978-79	173,566
1979-80	168,745
1980-81	204,968
1981-82	201,845
1982-83	199,064
1983-84	173,066
1994-85	153,433

Source: Saskatchewan Culture and Recreation, Annual Reports.

4.6.3. Natural Attractions

Natural Attractions include landform, biological and geological features which are significant and interesting to the visitor.

The southwest part of the province possesses such attractions as Big Muddy Badlands, the Great Sand Hills and the Short Grassland Prairie.

Southeastern Saskatchewan offers a variety of natural resource attractions such as the Thomas Battersby Wildlife Protected Arm, Last Mountain Refuge, potash mining and badland topography.

Northern Saskatchewan offers unlimited nature oriented recreational experiences including fishing, hunting, canoeing, photography and camping. Many of these opportunities have yet to be discovered.

4.6.4. Commercial/Cultural Attractions

Commercial/cultural attractions include handcraft, art and unique stores and displays. There are 142 identified attractions in Saskatchewan with over one-third located in Saskatoon and Regina. An additional one-third are found in the two southern regions (southwest and southeast).

Visitations to Mendel Art Gallery, Saskatoon
1978 - 1984

Year	Visitors (estimated)
1978	198,375
1979	190,632
1980	162,581
1981*	133,810
1982	137,304
1983	129,938
1984	133,981

*Closed for a five-week period.

Source: Director, Mendel Art Gallery (Unpublished).

Visitors to Wascana Centre, Regina, 1971-1984

Year	Double Decker Bus Passengers	Willow Island Visitors	Diefenbaker House Visitors
1971	5,626	7,232	32,371
1972	5,406	5,805	36,857
1973	6,483	6,292	36,749
1974	5,402	9,670	31,941
1975	6,103	5,247	27,104
1976	n/a	4,125	16,255
1977	6,297	n/a	23,941
1978	8,249	9,952	25,303
1979	6,873	7,740	26,042
1980	8,642	7,133	27,974
1981	7,985	7,095	23,144
1982	9,257	7,937	18,077
1983	6,713	6,813	17,039
1984	6,567	6,691	17,054

Source: Wascana Centre Authority (Unpublished).

4.7. Fishing

Angling in Saskatchewan is a major recreational activity. Anglers fished about 2.1 million days in 1980, or 11.4 days per angler. Licensed anglers caught an estimated 8.1 million fish of all species and retained 5.5 million of these which weighed an estimated 4 million kilograms.

In 1980, anglers spent $41.8 million in Saskatchewan on activities directly associated with sport fishing. Residents spent a total of $27.5 million; non-resident Canadians spent $4.5 million while U.S. and overseas anglers spent $9.8 million.(1)

In the 1980 calendar year, there were 216,373 licenced anglers in Saskatchewan.

Sport Fisheries Licence Sales, 1978-79 - 1983-84
(excludes seniors lifetime licences)

Year*	Resident	Non-Resident	One-Day	Total
1978-79	182,896	19,631	-	202,527
1979-80	178,372	19,413	-	197,785
1980-81	173,539	16,274	9,681	199,494
1981-82	178,361	15,733	11,854	205,948
1982-83	183,216	16,442	1,703	201,361
1983-84	178,138	17,977	1,288	197,403

Source: Saskatchewan Tourism and Renewable Resources, Annual Reports, 1978-79, 1981-82, and 1983-84 (Table - Licence Sales).

(1)Saskatchewan Parks and Renewable Resources and Department of Fisheries and Oceans, 1980 Survey of Sport Fishing in Saskatchewan.

Non-Resident Fishing Licences Sold to U.S. Residents, by State, 1980-1984

State	1980	1981	1982	1984
Alabama	24	16	15	34
Alaska	3	3	3	4
Arizona	100	140	144	117
Arkansas	69	77	67	109
California	342	425	477	419
Colorado	1,112	1,117	1,135	1,386
Connecticut	13	8	21	10
Delaware		3	-	3
D.C.	-	-	-	5
Florida	71	77	111	121
Georgia	22	19	23	42
Hawaii	6	-	5	-
Idaho	88	113	43	89
Illinois	678	545	623	606
Indiana	215	168	201	201
Iowa	1,048	1,209	1,260	1,100
Kansas	365	367	331	434
Kentucky	36	30	44	37
Louisiana	30	27	31	17
Maine	1	1	-	-
Maryland	8	13	9	7
Massachusetts	3	7	11	8
Michigan	132	145	131	142
Minnesota	1,543	1,773	2,112	2,139

continued

Non-Resident Fishing Licences Sold to U.S. Residents, by State, 1980-1984 (continued)

State	1980	1981	1982	1984
Mississippi	17	9	13	19
Missouri	290	238	304	384
Montana	1,423	1,419	1,657	1,875
Nebraska	1,180	1,279	1,103	1,246
Nevada	24	38	41	41
New Hampshire	2	-	5	-
New Jersey	17	17	24	23
New Mexico	34	49	71	81
New York	34	26	46	34
North Carolina	16	28	19	33
North Dakota	2,451	2,196	2,402	2,723
Ohio	122	127	133	146
Oklahoma	623	597	598	419
Oregon	52	37	75	45
Pennsylvania	28	16	41	71
Rhode Island	1	-	1	-
South Carolina	4	7	8	6
South Dakota	645	630	728	917
Tennessee	42	51	47	45
Texas	528	571	588	582
Utah	122	97	122	122
Vermont	-	1	5	1
Virginia	17	10	19	21
Washington	69	60	90	74
West Virginia	3	6	16	10
Wisconsin	317	377	433	423
Wyoming	504	594	659	573
Total	14,474	14,763	16,045	16,941

Source: Saskatchewan Parks and Renewable Resources (Unpublished).

4.8. Hunting

Saskatchewan Game Bird Licence Sales, 1982-1983

Origin	Licence Sales 1982	Licence Sales 1983	Change (%)
Saskatchewan Residents	50,179	47,157	- 6.0
Non-Resident (Canadian)	3,719	2,978	-19.9
Non-Resident (Foreign)	4,034	3,741	- 7.3
Total	57,932	53,876	- 7.0

Source: Saskatchewan Parks & Renewable Resources, Saskatchewan Game Management, 1983-84.

Active Waterfowl And Upland Game Bird Hunters, 1982-1983

Origin	Active Waterfowl Hunters 1982	Active Waterfowl Hunters 1983	Active Upland Game Bird Hunters 1982	Active Upland Game Bird Hunters 1983
Saskatchewan Residents	35,276	36,498	24,320	25,627
Non-Resident (Canadian)	3,296	2,807	1,014	1,139
Non-Resident (Foreign)	3,876	3,593	1,551	1,499
Total	42,448	42,898	26,885	28,265

Source: Saskatchewan Parks and Renewable Resources, Saskatchewan Game Management, 1983-84.

Big Game Licence Sales, 1982-83

Big Game	Licence Sales	
	1982	1983
White-Tailed Deer	64,957	55,600
Moose	12,777	10,073
Elk	3,720	4,081
Mule Deer	5,471	7,209
Antelope	2,554	2,411
Bear	4,437	4,375
Woodland Caribou	136	152
Big Game Archery	2,490	2,463

Source: Saskatchewan Parks and Renewable Resources, Saskatchewan Game Management, 1983-84.

Big Game Harvest, 1981-1983

Big Game	Harvest		
	1981	1982	1983
White-Tailed Deer	41,149	36,216	33,574
Moose	2,429	2,693	2,113
Elk	523	334	555
Mule Deer	3,662	4,079	6,231
Antelope	1,856	2,090	2,010
Black Bear	929	1,121	1,071
Woodland Caribou	54	35	27

Source: Saskatchewan Parks and Renewable Resources, Saskatchewan Game Management, 1983-84.

4.9. Ski Sites

In spite of being generally regarded as flat, Saskatchewan does have several skiing slopes.

Number of Skiers in Provincial Winter Recreation Sites, 1976-77 - 1983-84

Year	White Track	Cypress	Blackstrap	Duck Mtn.
1976-77	6,891	1,521	9,751	n/a
1977-78	10,553	6,277	13,829	n/a
1978-79	7,722	8,509	14,187	n/a
1979-80	4,014	4,910	8,936	n/a
1980-81	2,060	-	10,719	n/a
1981-82	5,343	7,076	12,540	1,308
1982-83	6,279	3,462	17,577	3,686
1983-84	4,746	3,452	15,583	3,465

Source: Saskatchewan Parks and Renewable Resources, Visitation and Outdoor Recreation Statistical Reports (Downhill Ski Statistics by Ski Area).

The following illustrates the geographic distribution of members of the Saskatchewan Ski Club Association:

	Percent
Saskatoon	21.9
Regina	22.0
La Ronge	6.0
Prince Albert	5.9
North Battleford	8.6
Humboldt	2.7
Meadow Lake	2.9
Yorkton	2.5
Maple Creek	2.8
Fort Qu'Appelle	1.1
Weyburn	1.8
Moose Jaw	2.2
Regina Beach	2.7
Cudworth	1.2
Plenty	0.6
Rosetown	0.4
Other Commuities	14.6
Unknown Responses*	n/a
Total	+100.0

Source: Saskatchewan Tourism and Small Business, Cross-Country/Alpine Ski Survey, February, 1985.

5. THE TOURISM INDUSTRY

The "tourism industry", while still lacking precise definition, is generally interpreted as consisting of all those facilities and services available for the attraction and handling of tourism activity.

Statistics Canada employs the Standard Industrial Classification (SIC)(1) to classify all Canadian businesses. The tourism industry includes businesses from the following SIC groups:

Scheduled Air Transport (SIC 4511)
Non-scheduled Air Transport, Chartered Industry (SIC 4512)
Aircraft Rental Industry (SIC 4522)
Charter and Sight Seeing Bus Services Industry (SIC 4574)
Limousine Service to Airports and Stations Industry (SIC 4575)
Taxicab Industry (SIC 4581)
Hotels, Motels and Tourist Courts (SIC 9111-9114)
Camping Grounds and Travel Trailer Parks (SIC 9131)
Recreation amd Vacation Camps (SIC 9141 & 9149)
Food Services (SIC 9211-9214)
Taverns, Bars and Nightclubs (SIC 9221)
Theatrical and Other Staged Entertainment Series (SIC 9631 & 9639)
Commercial Spectator Sports (SIC 9641-9644)
Sports and Recreation Clubs and Services (SIC 9651-9659)
Amusement Parks, Carnival and Circus Operators (SIC 9692)
Botanical and Zoological Gardens (SIC 9696)
Other Amusement and Recreation Services n.e.c. (SIC 9699)
Ticket and Travel Agencies (SIC 9961)
Tour Wholesalers and Operators (SIC 9962)

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(1)Statistics Canada, Standard Industrial Classification 1980, December, 1980.

5.1. Accommodations

The highest volumes of traffic in the province occur along Highway 1 (the Trans-Canada), Highway 11, (the main Regina/Saskatoon route), and Highway 16, (Yellowhead Highway). There are a total of 279 accommodation establishments on these highway routes which represent 27% of all accommodation establishments in the province.

Accommodation By Major Highway Corridor, 1983

Type of Accommodation	Trans-Canada	Yellowhead	Highway 11
Fixed Roof Establishments	112	104	20
Fixed Roof Rooms	4,778	4,851	217
Campground Establishments	23	15	5
Campground Sites	1,617	455	200

Source: Marshal C. Macklin Monaghan Western Limited, Saskatchewan Tourism Strategy, Data Analysis Program Report, December, 1983.

5.1.1. Hotels/Motor Hotels/Motels

As of May 1, 1985, there were 525 hotels/motor hotels in the province and 190 motels which offered a total of 17,230 rooms or units. During the 1981 calendar year, Saskatchewan hotels generated $235,880,000 in revenue, compared to $215,269.000 in 1980.(1) The receipts for the accommodation sector were derived from sale of rooms, food, beverage, etc. both to tourists and locals.

Number of Hotels/Motor Hotels and Motels and Total Number of Rooms, Saskatchewan, 1983 and 1985

Type	Establishments		Rooms	
	1983	1985	1983	1985
Hotels/Motor Hotels	551	525	12,822	12,288
Motels	204	190	5,032	4,942
Total	755	715	17,854	17,230

Source: Saskatchewan Tourism and Small Business, Inventory of Hotels/Motels and the Food Service Industry in Saskatchewan.

(1)Statistics Canada, Catalogue 63-204, Traveller Accommodation Statistics, 1980 and 1981.

Saskatchewan Hotels' Occupancy Rate, 1984

Month	Under 125 Rooms	Over 125 Rooms
January	32.9%	64.3%
February	39.9%	67.1%
March	38.8%	70.6%
April	52.9%	67.4%
May	48.1%	68.1%
June	51.9%	72.0%
July	60.8%	65.1%
August	58.6%	66.5%
September	47.1%	69.5%
October	54.3%	70.3%
November	50.8%	82.7%
December	38.3%	45.1%
ANNUAL	49.0%	67.9%

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Saskatchewan Hotels' Average Room Rate, 1984

Month	Under 125 Rooms	Over 125 Rooms
January	$27.81	$42.37
February	$29.42	$41.33
March	$30.40	$43.25
April	$30.39	$51.46
May	$30.20	$52.30
June	$31.33	$52.15
July	$35.19	$56.50
August	$34.48	$55.76
September	$33.06	$55.95
October	$33.14	$41.45
November	$32.52	$45.25
December	$32.93	$49.15
ANNUAL	$32.20	$48.58

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Saskatchewan Hotels' Double Occupancy Rate, 1984

Month	Double Occupancy Rate	Residents From Saskatchewan	Residents From Outside of Province
January	1.33	66.7%	33.3%
February	1.36	66.2%	33.8%
March	1.40	70.1%	29.9%
April	1.39	65.8%	34.2%
May	1.36	55.3%	44.7%
June	1.44	54.9%	45.1%
July	1.76	51.3%	48.7%
August	1.73	45.9%	54.1%
September	1.52	52.9%	47.1%
October	1.36	57.3%	42.7%
November	1.38	58.9%	41.1%
December	1.39	57.6%	42.4%
ANNUAL	1.56	57.7%	42.3%

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Saskatchewan Motels' Occupancy Rate, 1984

Month	Under 40 Rooms	Over 40 Rooms
January	33.4%	52.0%
February	42.9%	63.0%
March	42.8%	67.0%
April	44.8%	62.6%
May	50.4%	67.1%
June	61.9%	77.4%
July	63.4%	79.9%
August	66.0%	78.3%
September	52.3%	69.9%
October	51.1%	68.8%
November	46.3%	66.0%
December	30.1%	43.1%
ANNUAL	46.1%	65.8%

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Saskatchewan Motels' Average Room Rate, 1984

Month	Under 40 Rooms	Over 40 Rooms
January	$24.32	$35.16
February	$25.51	$35.89
March	$25.73	$36.24
April	$24.91	$37.05
May	$25.70	$36.75
June	$23.99	$36.84
July	$27.58	$37.13
August	$25.94	$37.23
September	$29.75	$36.16
October	$27.50	$36.81
November	$30.25	$37.02
December	$27.19	$35.95
ANNUAL	$26.76	$36.47

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Saskatchewan Motels' Double Occupancy Rate, 1984

Month	Double Occupancy Rate	Residents From	
		Saskatchewan	Outside of Province
January	1.59	69.4%	35.1%
February	1.59	64.8%	35.2%
March	1.59	62.3%	37.7%
April	1.58	59.0%	41.0%
May	1.53	57.4%	42.6%
June	1.58	56.0%	44.0%
July	1.45	64.5%	35.5%
August	1.34	61.9%	38.1%
September	1.39	68.4%	31.6%
October	1.63	61.2%	38.8%
November	1.60	63.8%	36.2%
December	1.95	65.0%	35.0%
ANNUAL	1.51	60.2%	39.8%

Source: Saskatchewan Tourism and Small Business, Hotel Occupancy Study, 1985.

Selected Occupations
Saskatchewan Average Hourly Wages - October 1, 1984
(Full-Time Employees)

Occupation	Hourly Wage
Supervisor, Chefs & Cooks	$ 8.74
Supervisor, Waiters & Waitresses	$ 7.29
Cook, General	$ 5.95
Bartender	$ 6.91
Waiter/Waitress, Beverage Room	$ 5.46
Waiter/Waitress, Formal Service	$ 4.42
Waiter/Waitress, Coffee Shop	$ 4.88
Executive Housekeeper	$ 6.36
Chambermaid/man	$ 8.88
Desk Clerk	$ 5.72
Laundry Foreman	$10.68
Laundryman/woman	$ 9.29
Janitor	$ 9.18
Service Station Attendant	$ 6.32
Motor Vehicle Mechanic	$11.87
Garage Serviceperson	$10.31
Bus Driver, Urban	$11.71
Cashier, Hotels and Motels	$ 6.24

Source: Saskatchewan Labour, Wages and Working Conditions by Occupation, October, 1984 pp. 105-120, 98, 147, 154, 175, 83 and 67.

Saskatchewan Tourism Related Occupations
Average Monthly Wages - October 1, 1984
Full-Time Employees

Occupation	Monthly Wage
Recreation Director	$2,305.18
Recreation Worker	$2,002.79
Teller	$1,245.18
Head Cashier	$1,986.19
Salesperson, Service	$1,524.63
Department Manager	$2,000.02
Assistant Department Manager	$1,741.70
Salesclerk, Class "A"	$1,055.95
Salesclerk, Class "B"	$1,021.11
Salesclerk, Class "C"	$1,368.28

Source: Saskatchewan Labour, Wages and Working Conditions by Occupation, October, 1984 pp. 27-8, 65, 72 and 91-94.

An April, 1983, study of Saskatchewan's hospitality sector noted that the classic industry manpower problems of staff shortages, high staff turnover, and lack of adequate training and career development were not as severe as five years ago. Problems of high staff turnover had been reduced significantly in some occupations while it still remains high for occupations such as waiters and waitresses. Industry-wide labour turnover costs were approximately $3.4 million in 1982. A hotel employing 150 people with a 40% turnover rate would have experienced extra labour costs of $40,000 in 1982.

Comparison of Staff Turnover Rates in Selected Occupations in Saskatchewan Hotels, 1977 & 1982

Occupation	Turnover 1977 (%)	Turnover 1982 (%)	Change (%)
Manager/Administrator	39	11	-28
Front Office Staff	32	23	- 9
Cooks/Chefs	40	9	-31
Waiters/Waitresses:			
Food	54	51	- 3
Beverage	58	51	- 7
Kitchen Help	53	43	-10

Source: Derek Murray Consulting Assoc. Inc., An Assessment of Manpower and Training Needs For Saskatchewan's Hospitality Industry, April, 1983.

Vacancy rates were found to be the highest for kitchen help and cooks/chefs.

Vacancy Rates For Selected Hospitality Industry Occupations, March, 1983

Occupation	Hotels			Restaurants		
	Total	Positions Vacant	%	Total	Positions Vacant	%
Managerial	151	4	3	49	0	0
Front Desk/Office	120	1	1		-	-
Cooks/Chefs	151	10	7	96	4	4
Kitchen Help	129	8	6	103	7	7

Source: Derek Murray Consulting Assoc. Inc., An Assessment of Manpower and Training Needs For Saskatchewan's Hospitality Industry, April, 1983.

A substantial demand still exists for training in the hospitality industry. The greatest demand was found to be for training waiters and waitresses. A significant demand was also noted for courses teaching staff "How to Deal With the Public" and "Customer Relations".

Demand For Training Programs Expressed by Managers, 1980 and 1983

Type of Course	1983 Hotels Etc. No.	1983 Hotels Etc. Total (%)	1983 Restaurants No.	1983 Restaurants Total (%)	1980 Hotels & Restaurants No.	1980 Hotels & Restaurants Total (%)
Waiter/Waitress Training	11	58	10	58	1	1
Front Desk Staff	7	37	n/a		-	-
Cooks Training	3	15	2	12	2	2
Management Post - Secondary Training	1	5	-	-	-	-
How to Deal With the Public	5	26	3	18	3	6
Customer Relations	5	26	2	12	5	6
Bartenders Course	1	5	2	12	2	2
Supervisor Training	3	15	-		2	4
Staff Recruitment	1	5	-	-	-	-
Industry Awareness - Industry Orientation	2	10	-	-	-	-
Housekeeping	2	10	n/a	n/a	-	-

Source: Saskatchewan Tourism and Renewable Resources, Accent Hospitality Survey, 1980 (Unpublished).

Derek Murray Consulting Assoc. Inc., An Assessment of Manpower and Training Needs for Saskatchewan's Hospitality Industry, April, 1983.

Both the Saskatchewan Technical Institute located in Moose Jaw and Kelsey Institute of Applied Arts and Sciences in Saskatoon offer courses in commercial cooking. Only Kelsey offers a diploma program in hotel and restaurant administration.

5.1.2. Outfitter & Tourist Camps

There are 232 outfitter camps and 18 tourist camps in the province. Outfitters are of three types. Some have a base camp as well as outpost camps. Others provide outpost accommodation but have no base camp. Still others provide no accommodation.
In 1980, receipts to outfitter camps totalled $8,247,000. In 1981, these receipts increased to $7,232,000(1).

Number, Type and Capacity of Outfitter Camps, 1983

	Base Camp			Outpost Camps		
	Number of Properties	No. of Cabins	Capacity (Persons)	Outpost Locations	No. of Cabins	Capacity (Persons)
Type 1+						
Road Access	131	972	4,686	39	60	327
Fly-In	83	393	1,828	44	64	319
Total	214	1,365	6,514	83	124	646
Type 2++						
Road Access	0	n/a	n/a	0	0	0
Fly-In	7	n/a	n/a	24	40	146
Total	7	n/a	n/a	24	40	146
Type 3+++						
Road Access	11	n/a	*	0	0	0
Fly-In	0	0	0	0	0	0
Total	11	0	*	0	0	0

* Some tent camp or non-property accommodation is probably available.
\+ Base camp and outpost camp accommodation.
++ No base camp, but outpost accommodation.
+++No accommodation.

Source: Saskatchewan Tourism and Small Business, Tourism Development Branch, Inventory of Accommodations (Unpublished).

(1)Statistics Canada, Catalogue 63-204, Traveller Accommodation Statistics - Annual (Table 14).

Tourist camps have no outfitting licences and do not provide outfitting services, but accommodation is available.

In 1980, receipts to tourist courts and cabins totalled $1,298,000. In 1981, these receipts increased to $2,598,000.(1).

Number, Capacity of Tourist Camps*
In Saskatchewan, 1983

Type	Number of Properties	No. of Cabins	Capacity (Persons)
Road Access	16	201	881
Fly-In	2	8	26
Total	18	209	907

*Including recreation vacation camps.

Source: Saskatchewan Tourism and Small Business, Tourism Development Branch, Inventory of Accommodations (Unpublished).

(1)Statistics Canada, Catalogue 63-204, Traveller Accommodation Statistics -Annual.(Unpublished).

"An Economic Survey of Saskatchewan's Outfitting Industry" which was published in September, 1984, provides origin of visitors, average length of stay of visitors and demand for outfitter camps.

Number of Guests and Their Place of Residence, 1981

Origin	Southern Road[1]	Northern Road[2]	Northern Remote[3]	Total
Saskatchewan	19,930	23,984	3,189	47,103
Rest of Canada	6,236	5,017	1,156	12,409
United States	5,083	10,965	8,446	24,494
Other Countries	420	500	5	925
Total	31,699	40,466	12,796	84,931

Average Duration of Stay of Outfitter's Clientele, 1981

Length of Stay	Southern Road[1]	Northern Road[2]	Northern Remote[3]	Total
1 - 4 Days	21,805	30,438	10,139	62,382
5 - 7 Days	7,374	8,255	2,519	18,148
More Than 7 Days	2,490	1,773	138	4,401
Total	31,669	40,466	12,796	84,931

Capacity Utilization of Outfitting Camps, 1981

	Actual Guest-Days	Potential Guest-Days	Capacity Utilized
Northern Remote[3]	47,308	156,862	30.2%
Northern Road[2]	196,248	432,974	45.4%
Southern Road[1]	124,894	330,560	37.8%
Total	368,410	920,396	40.1%

[1]Outfitters south of the Northern Administrative District and road accessible.
[2]Outfitters north of the Northern Administrative District and road accessible.
[3]Outfitters north of the Northern Administrative District and not road accessible.

5.1.3 Saskatchewan Farm Vacations and Bed and Breakfast

In 1985, 26 farms were members of the Saskatchewan Farm Vacations Association. The Association defines a farm vacation as "a unique living". Country living can be a form of tourism as an attraction or holiday, or an educational experience promoting an understanding of an agricultural way of life.

According to a study, which was commissioned by Saskatchewan Tourism and Small Business in 1984, the number of guest days increased from 643 in 1976 to 8,486 in 1981-82. During 1983-84, 11,232 guest days were spent on vacation farms.

Visitations to Saskatchewan Farm Vacations, 1983-84*

School Programs	5,865	
Group Tours	2,045	
Vacation Guests	563	(for 3,322 days)
Total Visits	11,232	

*Based on 17 reporting farms.

5.2. Food Services

Number of Food Service Establishments
In Saskatchewan and Seating Capacity, 1984

Location	Establishments
Regina	401
Saskatoon	449
Other Saskatchewan	2,592
Total	3,113

Source: Regina City Health Department, Saskatoon City Health Department, and Saskatchewan Health, Community Health Services Branch (Public Health Inspection Division).

Restaurant Receipts in Saskatchewan, 1981-1984

Year	Receipts
1981	$275,400,000
1982	$329,300,000
1983	$336,439,000
1984	$343,100,000

Source: Statistics Canada, Catalogue 63-011, Restaurant, Caterer and Tavern Statistics (January, 1985 Issue).

5.3. Charter and Sightseeing Bus Services Industry

The 426 motorcoach tour departures to Saskatchewan in 1982 spent a total of 597 nights in the province. The predominant city in which motorcoach tours overnighted was Regina.

The estimated total direct economic impact of motorcoach tourist activity to Saskatchewan in 1982 was $987,640. With a multiplier effect of 1.6, the direct and indirect benefits to the tourism industry and the province were $1,580,200.

Saskatchewan Motor Coach Tour Departure Statistics, 1978-1984

Origin of Tour Departures	1978	1979	1980	1982	1983*	1984*
United States	91	83	113	129	120	133
Canada	174	251	280	297	288	339
Total	265	334	393	426	408	472

*Projected departures.

Source: Saskatchewan Tourism and Small Business, Business Information and Research Branch (Unpublished Survey).

There are also 38 bus operators in the province with route, express and charter operations within Saskatchewan.

5.4. Air Services

Inter-provincial air service from Saskatchewan is provided by Air Canada and Pacific Western Airlines. Direct air service from Regina and Saskatoon to the U.S. is provided by Frontier Airlines and by Norcanair. The major intra-provincial air carrier is Norcanair(1).

5.5 Ticket and Travel Agencies

There are approximately 101 ticket and travel agencies located in various communities throughout Saskatchewan.

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(1)Statistics on Inbound Passengers to the Regina and Saskatoon airports are given on page 32.

Transporation by Air

Saskatchewan to Selected North American Cities

(Hours)

Notes: Time from Regina = R
Time from Saskatoon = S

6. COMPARISON OF TOURISM AS AN INDUSTRY TO OTHER INDUSTRIES

Tourism can be defined as an export industry since it generates new dollars to the provincial economy. The only difference is that rather than physically exporting a product, the traveller consumes the product at the destination.

Comparison of the Value of
Tourism to Other Saskatchewan Exports, 1983

Exports	Value
Manufactured Goods	$ 798,000,000
Grain	$3,172,000,000
Potash	$ 686,000,000
Lumber	$ 34,000,000
Crude Oil	$1,714,000,000
Tourism	$ 212,000,000
Livestock	$ 75,000,000
Uranium	$ 120,000,000
Selected Exports	$ 372,000,000

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, TAB: EXPORTS, January, 1984, p. T.O.

7. SASKATCHEWAN'S BALANCE ON TRAVEL ACCOUNT

Saskatchewan residents travel in greater volumes to destinations outside their own province than visitors from other Canadian provinces travel to Saskatchewan for tourism related purposes.

Balance of Travel Flows Between Saskatchewan
And Other Canadian Destinations, 1979-1980, 1982, 1984
(in person-trips)

Year	Inflow to Saskatchewan From Other Canadian Provinces	Outflow of Saskatchewan Residents to Other Canadian Provinces	Gain	Loss
1979	1,045,000	1,376,000	n/a	331,000
1980	1,085,000	1,632,000	n/a	584,000
1982	1,048,000	1,044,000	5,000	n/a
1984*	1,006,000	1,104,000	n/a	98,000

*Preliminary - Travel Survey Data.

Source: Statistics Canada, Canadian Travel Survey (Canadian Destinations Only - Printout), 1979-82.

As a result, Saskatchewan has a deficit on its balance of payments with other Canadian provinces.

Saskatchewan's Deficit on Travel Account With Canada, 1971-1983

Year	Non-Saskatchewan Canadian Expenditures In Saskatchewan	Saskatchewan Expenditures In Other Canadian Provinces	Deficit
1971	$ 35,000,000	$ 49,000,000	$ 14,000,000
1972	$ 40,000,000	$ 53,000,000	$ 13,000,000
1973	$ 47,000,000	$ 71,000,000	$ 24,000,000
1974	$ 56,000,000	$ 85,000,000	$ 29,000,000
1975	$ 65,000,000	$107,000,000	$ 42,000,000
1976	$ 74,000,000	$114,000,000	$ 40,000,000
1977	$ 82,000,000	$117,000,000	$ 35,000,000
1978	$ 92,000,000	$133,000,000	$ 41,000,000
1979	$104,000,000	$151,000,000	$ 47,000,000
1980	$118,000,000	$170,000,000	$ 52,000,000
1981	$137,000,000	$215,000,000	$ 78,000,000
1982	$151,000,000	$229,000,000	$ 77,000,000
1983	$159,000,000	$232,000,000	$73,000,000

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, TABS: EXPORTS and IMPORTS, January, 1985.

It should be remembered that the deficit on travel account is not solely a function of the volume of travel. Other factors also contribute to a deficit, including length of stay, type of accommodation used, activity participation, and purpose of travel (such as visiting friends/relatives or staying in a resort).

No actual and accurate data exist on the number of Saskatchewan residents travelling to the U.S. The best indicator which is currently available is the number of Canadian residents returning to Saskatchewan via the Saskatchewan-U.S. border. However, it should be noted that residents of the province may re-enter Canada from the U.S. through the U.S./Manitoba border, the U.S./Alberta border, etc.

Resident Travellers Returning to Saskatchewan Via the U.S./Saskatchewan Border, 1979-1984

Year	Returning From the U.S.
1979	383,331
1980	402,442
1981	400,225
1982	385,472
1983	475,334
1984	415,704

Source: Statistics Canada, Catalogue 66-001, Travel Between Canada and Other Countries, October-December Quarterly (Table 16).

As with the U.S., no actual figures are available as to how many Saskatchewan residents travel to countries other than the U.S. A 1980 estimate suggests that 27,500 Saskatchewan residents travelling to countries other than the U.S. for a total of 683,500 person-nights while visitors to Saskatchewan from countries other than the U.S. spent 344,300 person-nights in the province.

Saskatchewan's Deficit On Travel Account With U.S. and Other Countries, 1971-1983

Year	U.S. And Other Country Expenditures In Saskatchewan	Saskatchewan Expenditures In U.S. And Other Countries	Deficit
1971	$11,000,000	$ 49,000,000	$ 38,000,000
1972	$12,000,000	$ 47,000,000	$ 35,000,000
1973	$17,000,000	$ 64,000,000	$ 47,000,000
1974	$14,000,000	$ 74,000,000	$ 60,000,000
1975	$16,000,000	$101,000,000	$ 85,000,000
1976	$23,000,000	$117,000,000	$ 94,000,000
1977	$24,000,000	$128,000,000	$104,000,000
1978	$33,000,000	$144,000,000	$111,000,000
1979	$40,000,000	$141,000,000	$101,000,000
1980	$46,000,000	$161,000,000	$115,000,000
1981	$52,000,000	$186,000,000	$134,000,000
1982	$52,000,000	$186,000,000	$134,000,000
1983	$53,000,000	$215,000,000	$162,000,000

Source: Saskatchewan Bureau of Statistics, Saskatchewan Economic Statistics, TABS: EXPORTS and IMPORTS, January, 1985.

APPENDIX

OTHER STUDIES AVAILABLE FROM SASKATCHEWAN TOURISM AND SMALL BUSINESS

1. Travel Markets for Saskatchewan's Tourism Industry ($5.00 each)

   a) Alberta Report
   b) British Columbia Report
   c) Manitoba Report
   d) Minnesota Report
   e) Montana Report
   f) North Dakota Report
   g) Ontario Report

2. Market Opportunity Studies ($5.00 each)

   a) Candle Lake Resort
   b) Cypress Hills Dude/Guest Ranch
   c) Lake Diefenbaker - Elbow Harbour
   d) Lake Diefenbaker - Hunting and Fishing Resort
   e) Makwa Lake Ski Hill/Golf Course
   f) Meadow Lake Provincial Park Accommodation/Food Services
   g) Redberry Lake

3. Hotel/Motel Occupancy Statistics 1983 and 1984 ($3.00)

4. A Study to Determine the Impact of Events on Local Economies ($5.00)

5. Tipperary Creek Conservation Area Heritage Attraction: Tourism Impact Study ($5.00)

6. An Economic Survey of Saskatchewan's Outfitting Industry ($5.00)

7. Saskatchewan Government Information Centre Report, 1984 (Free)

8. Bibliography of Tourism Surveys and Reports ($5.00)

9. Saskatchewan Quarterly/Recreation Indicators (Free)